

**UNITED STATES DISTRICT COURT**  
**SOUTHERN DISTRICT OF WEST VIRGINIA**  
**AT**

**V.** **REPORT OF PARTIES' PLANNING MEETING**  
**CASE NUMBER**

*Guideline for parties and attorneys:*  
The parties are advised to use the *Worksheet for Report of Parties Planning Meeting* (Form USDC/ATTY-004 located on the Court's website at [www.wvsd.uscourts.gov](http://www.wvsd.uscourts.gov)) and the suggested guidelines contained in the form's comments.

1. Pursuant to Fed.R.Civ.P. 26(f), a meeting was held on \_\_\_\_\_. Those participating were:

\_\_\_\_\_ for plaintiff(s)  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_  
\_\_\_\_\_ for defendant(s) \_\_\_\_\_

2. Pre-Discovery Disclosures. The parties will exchange by \_\_\_\_\_  
the information required by Fed.R.Civ.P. 26(a)(1).

3. Plaintiff(s) should be allowed until \_\_\_\_\_ to join additional parties and  
until \_\_\_\_\_ to amend the pleadings. Defendant(s) should be allowed until  
\_\_\_\_\_ to join additional parties and until \_\_\_\_\_ to amend the  
pleadings.

4. Discovery Plan. The parties jointly propose to the court the following discovery plan:  
[Use separate paragraphs or subparagraphs as necessary if parties disagree.]

Discovery will be needed on the following subjects: ?

Disclosure of electronically stored information should be handled as follows: ?

The parties have agreed to an order regarding claims of privilege or of protection as trial-preparation material asserted after production, as follows: ?

This action \_\_\_\_\_ suitable for designation as a complex case requiring special case management procedures and additional pretrial conferences. If the parties and attorneys believe that the case is complex, the basis for that belief is: ?

The last date to serve discovery requests is \_\_\_\_\_. The last date on which to take a discovery deposition is 45 days after the last date to serve discovery requests. The last date on which to take a discovery ? position is known as the “discovery completion date.” [Discovery on \_\_\_\_\_ to be completed by \_\_\_\_\_.] ?

The parties \_\_\_\_\_ adopt the discovery limits set forth in the Federal Rules of Civil Procedure. If the parties and attorneys believe that more discovery is needed, the basis for that belief is: ?

Reports from retained experts under Rule 26(a)(2) due:

By the party with the burden of proof on an issue: \_\_\_\_\_;

By the party not bearing the burden of proof on an issue: \_\_\_\_\_; and  
Expert witness disclosures intended solely to contradict or rebut evidence on the same issue  
identified by another party: \_\_\_\_\_.

5. Magistrate judges will resolve discovery disputes. The parties \_\_\_\_\_ to have a  
United States magistrate judge conduct any and all further proceedings in the case, including  
trial, and order the entry of a final judgment.

6. Mediation shall take place on or before \_\_\_\_\_.

7. Potential dispositive motions shall be filed by \_\_\_\_\_, with responses and  
replies filed according to the Local Rules.

8. The parties request a pretrial conference in \_\_\_\_\_.  
The plaintiff(s) shall submit a proposed pretrial order to defendant(s) on or before  
\_\_\_\_\_.

The defendant(s) shall compile a proposed integrated pretrial order and submit it to chambers  
of the presiding judicial officer on or before \_\_\_\_\_.

9. Where applicable, proposed jury instruction shall be exchanged and transmitted to chambers  
of the presiding judicial officer in Microsoft Word format on or before \_\_\_\_\_.

10. Where applicable, proposed findings of fact and conclusions of law shall be exchanged and  
transmitted to chambers of the presiding judicial officer in Microsoft Word format on  
or before \_\_\_\_\_.

11. A final settlement conference will take place on \_\_\_\_\_.

The parties \_\_\_\_\_ a conference with the court before entry of the scheduling order.

Page 4 of 4